Business Profile Pro

FREE CHECKLIST

Lead Follow-up Email and SMS Checklist

Short, friendly messages to send when a new lead comes in, and when a quote goes quiet.

1 Get set up

- [ ] Decide **who** answers new leads.
- [ ] Set a **response goal**, such as the same business day.
- [ ] Turn on alerts for new calls, messages and forms.
- [ ] Save your messages as snippets so you can send them quickly.
- [ ] Add an automatic reply for after-hours messages.

2 Reply to a new lead

- [ ] **Thank** the person and use their first name.
- [ ] **Answer** their question or confirm what they asked for.
- [ ] Offer **one clear next step**, such as a call or a visit.
- [ ] Ask how they prefer to be contacted.

FIRST REPLY OUTLINE

Hi [first name], thanks for reaching out to [business name]!
I can help with [service]. Would [day] at [time] work for a quick call or a visit?
[your name], [phone number]

3 Follow up when a quote goes quiet

- [ ] **Same day:** confirm they received the quote.
- [ ] **2 to 3 days later:** ask whether they have any questions.
- [ ] **About a week later:** share something helpful, such as a photo of a similar job.
- [ ] **Final message:** let them know the offer is still open and close the loop politely.

QUOTE FOLLOW-UP OUTLINE

Hi [first name], just checking in on the quote for [job].
Happy to answer any questions or adjust the scope. Would you like to move forward?
[your name]

TIP Be helpful, not pushy. A friendly nudge is often welcomed.

4 Keep it respectful

- [ ] Only message people who contacted you or asked to hear from you.
- [ ] Include a way to **opt out** of texts, and honor requests quickly.
- [ ] Check the texting and email rules that apply in your area.
- [ ] Stop following up when someone says no.

5 Track and improve

- [ ] Record **where each lead came from** and the outcome.
- [ ] Note reasons when a job is lost.
- [ ] Review your results monthly and adjust your messages.

Business Profile Pro

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